

State of Utah – Division of Facilities Construction & Management

Electronic Document Management System (EDMS)

STEP-BY-STEP NARRATIVE

The following is a step-by-step guide on how DFCM staff and other authorized personnel can submit projects to be reviewed by the building official and review the status of those submissions throughout the plan review and inspection process. This system will also archive the approved construction documents and certificates of occupancies for approved and completed projects.

Step #1 – DFCM Project Manager submits plan review request

- 1a. The DFCM Project Manager (PM) logs into the EDMS.
- 1b. The default screen displays all active projects currently assigned to that PM. Click on the upper left tab to submit a new permit request.
- 1c. This screen lists permit requests that have not yet been accepted by the Administrator. Click on the “+ New Application” button on the right side of the screen.
- 1d. The PM then needs to fill out the permit application and clicks on “Submit” button once the application is completed.
- 1e. After submitting the application the PM needs to list the Project Contact (typically the architect) for the project. Once completed an automatic email notification will be sent to the DFCM Administrator (i.e. Gail Youngblood).

Step #2 – The DFCM Administrator reviews request and assigns access privileges to necessary parties

- 2a. The DFCM Administrator will receive an automated email once the permit request has been completed notifying them to review the request.
- 2b. The DFCM Administrator should follow steps 1a and 1b to log into the EDMS and access the permit request screen.
- 2c. Click on the project name for the permit request in question and review the permit application for completeness.
- 2d. If complete click on the “Accept Permit Request” button at the bottom of the screen. An automatic email will then be sent out to the Project Contact notifying them that they can now upload the construction documents to the system.

Step #3 – Project Contact (Architect, Engineer or other Design Professional) uploads submittals to the EDMS

- 3a. The Project Contact and PM will receive an automated email once the permit request has been accepted by the DFCM Administrator.
- 3b. The Project Contact should now log into the EDMS and type in their email address and temporary password they received from the system. A permanent password will be provided after logging in the first time.
- 3c. Once logged into the system you will see a list of projects assigned to you. Click on the DFCM number for the project in question.
- 3d. The first screen you will see includes the building permit application. If any of this information is incorrect you can update it by clicking the "Edit Application" button at the bottom of the screen.
- 3e. To upload the construction documents to the EDMS click on the "Submittals" button at the top of the screen and then click on the "View/Upload Submittal" button under the "Action" tab.
- 3f. To add a new submittal click on the "+ New Submittal" button on the right-hand side of the screen. In this screen you can now upload the construction documents. Each set of submittals that are uploaded to the EDMS must be accompanied with a transmittal letter listing the items that are uploaded.
- 3g. After uploading all necessary documents for that particular submittal (i.e. plans, calculations, specifications, energy/geotechnical reports, etc.) please click on the checkbox noting that the submittal is complete. If this is not done the system will think that additional items need to be uploaded to that particular submittal and the process cannot be completed.
- 3h. After the submittals have been uploaded the system will automatically take the Project Contact to the "Deferred Submittals" screen. At this point all deferred submittals should be noted. If deferred submittals do not apply to this project the "Not Applicable" button should be selected.
- 3i. After the deferred submittals have been noted the system will automatically take the Project Contact to the "Special Inspections" screen. At this point all special inspections and structural tests required for the project should be noted. If special inspections/testing do not apply to this project the "Not Applicable" button should be selected.
- 3j. After the special inspections/tests have been uploaded the system will automatically take the Project Contact to the "Structural Observations" screen. At this point all structural observations should be noted. If observations do not apply to this project the "Not Applicable" button should be selected.
- 3k. Once each of these four steps have been completed (1. Uploading submittal; 2. Listing deferred submittals; 3. Listing special inspections; and 4. Listing structural observations) the screen will notify you that the submittal was successfully uploaded and an

automated email will be sent to the DFCM PM informing them that these files are now in the system.

Step #4 – DFCM Project Manager reviews uploaded documents to ensure a complete submittal

- 4a. After the submittals have been uploaded the PM will receive an automated email notifying them to review the submittals for completeness.
- 4b. The PM then logs into the EDMS and selects the project in question.
- 4c. To review the submittals click on the “Submittals” button at the top of the screen and then click on the “View/Upload Submittal” button under the “Action” tab.
- 4d. The PM should review each of the items uploaded by the Project Contact and verify that a complete submittal has been provided.
- 4e. Once it has been confirmed that all documents required by the Building Official have been uploaded click on the “Submittal Complete” button at the bottom of the screen. At this point an automatic email is sent to the Building Official informing them that reviewers can now be assigned to this project.

Step #5 – DFCM Building Official assigns plan review personnel to project

- 5a. After the PM has verified that all submittals have been uploaded an automated email will be sent to the Building Official notifying them that the project is ready to be reviewed.
- 5b. The Building Official logs into the EDMS and selects the appropriate project.
- 5c. Click on the “Add/Edit Users” tab at the upper left-hand portion of the screen and then add the appropriate reviewers from the drop-down menu at the bottom of the screen. At this point an automated email will be sent to each reviewer notifying them of their assignment.

Step #6 – DFCM Building Official Assigned Reviewers perform their review and upload comments to EDMS

- 6a. After the Building Official has assigned the Reviewers for the project an automated email will be sent out notifying the Reviewers of their assignment.
- 6b. The Reviewers then log into the EDMS and click on the project in question.
- 4f. All submittals can be found when clicking on the “Submittals” button at the top of the screen and then on the “View/Upload Submittal” button under the “Action” tab. Submittals can be reviewed using Adobe Acrobat, Bluebeam®, or other software.
- 6c. Plan review comments are then uploaded to the system by clicking on the “View/Upload Submittal” button under the “Action” tab and then on the “+ New Comment” button in

the upper left-hand portion of the screen. Either MSWord or PDF documents can be uploaded to the system.

- 6d. When uploading comments please note the review you have performed (i.e. Building Code, Structural, Fire, etc.) and the specific submittal number the comments are in relation to.
- 6e. After clicking on the “Upload Files” button at the bottom of the page an automatic email will be sent to the Project Contact notifying them that comments in relation to their submittal need to be addressed.

Step #7 – Project Contact (Architect, Engineer or other Design Professional) submits responses and revisions

- 7a. Once comments from the Reviewers have been uploaded to the EDMS an automated email is sent out to the Project Contact and copied to the DFCM PM notifying them of issues that need to be resolved.
- 7b. The Project Contact then logs into the EDMS and uploads written responses to the plan review comments as well as any necessary revisions, similar to Step #3. Please note that only revised sheets should be uploaded in subsequent submittals.
- 7c. Steps 6 & 7 are repeated until all plan review comments have been addressed.

Step #8 – Building Official issues building permit

- 8a. If a “conformed” set of construction documents needs to be provided prior to issuing the building permit Reviewers must note this prior to “Approving” their review. This is done similar to step 6e, except the appropriate check boxes must be clicked by the Reviewer.
- 8b. Once the Building Official receives notice that all reviews have been “Approved” they will place the building permit stamp on the final construction documents and upload the “Approved” plans to the EDMS.
- 8c. An automated email is then sent to the DFCM PM and Project Contact notifying them that the “Approved” documents are posted on the EDMS. The PM should ensure that the Contractor has one full-size hard copy of all “Approved” submittals onsite at all times during construction.

Step #9 – Code Inspection Firm uploads inspection reports to EDMS

- 9a. Sometime prior to commencing construction the DFCM Administrator will assign a Code Inspection Firm (CIF) to the project and grant them access to the system.
- 9b. The CIF logs into the EDMS and clicks on the “Inspections” tab at the top of the page and then on the project in question.

- 9c. The first step is to click on the “Distribution List” tab and to input the emails of the persons that should be receiving code inspection and special inspection reports throughout the project (i.e. Building Official, PM, Project Contact, Contractor, etc.).
- 9d. To upload a code inspection report click on the gold “Code Inspection Reports” tab and then selecting the particular file. The system will send out automatic emails to each member of the distribution list with a PDF of the report attached.
- 9e. Special inspection and testing reports are uploaded similarly but by clicking on the gold “Special Inspection Reports” tab at the top of the screen.

Step #10 – DFCM Building Official issues certificate of occupancy

- 10a. A “final” code inspection report and special inspection report is required before the building official can issue a Certificate of Occupancy (CO). These reports are added as noted in steps 9d and 9e except the “final” report is selected from the drop-down list under the “Type” tab.
- 10b. Prior to issuing a CO, all listed deferred submittals and structural observations reports will need to have been submitted to the EDMS similar to the original construction documents and approved by the assigned reviewers.
- 10c. Once everything is complete the Building Official uploads the signed “Certificate of Occupancy” form to the EDMS.